



UMC Call to Action: Vital Congregations Research Project

Findings Report for Steering Team

June 28, 2010

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TOWERS WATSON 

Executive Summary

- Towers Watson conducted comprehensive, robust research (using proven data collection and analysis techniques) on data from various sources and types of surveys across North America
 - Response rate to the surveys was good, which ensures the findings are reliable at a 95% level of confidence
- Towers Watson calculated a vitality index for each church based on indicators of vitality identified by the Steering Committee
 - Calculation was done for churches where data were available (n=32,228)
 - Also calculated three sub-factors of vitality – attendance, growth and engagement
- Based on vitality index, Towers Watson found that all kinds of UMC churches are vital – small, large, across different geographies, and church setting (e.g., urban, rural)
- Towers Watson conducted regression analyses to identify drivers of the vitality index and four key drivers of vitality stand out – crystal clear findings that are actionable
- The four key drivers of vitality are fairly consistent across different types of churches

Four key areas are the drivers of vitality



Note: Small groups include study, fellowship, and service.
Programs include classes and other activities

Driving different factors of vitality

Driver	Overall Vitality	Attendance Factor	Growth Factor	Engagement Factor
Small Groups				
Number of small groups				
Number of programs for children				
Number of programs for youth				
Lay Leadership				
Effectiveness of lay leadership				
Lay leadership demonstrating vital personal faith				
Rotating lay leadership				
% of attendees serving as leaders in past 5 years				
Worship Service				
Mix of Traditional and Contemporary service				
Using more topical preaching in Traditional service				
Using more contemporary music in Contemporary service				
Using more multi-media in Contemporary service				
Pastor				
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance				
Influencing the actions and behaviors of others to accomplish changes in the local church				
Propelling the local church to set and achieve significant goals through effective leadership				
Inspiring the congregation through preaching				
Length of appointment				

 Denotes the driver has a positive impact on the factor of vitality



Project Methodology

Research project methodology

February

Establish Foundation

- ✓ Launch the process (project team and steering team)
- ✓ Identify key stakeholders
- ✓ Develop communication plan and messages
- ✓ Identify key performance outcomes
- ✓ Assess existing data sources

February - March

Develop Hypotheses

- ✓ Select interviewees
- ✓ Develop interview guide and conduct interviews
- ✓ Identify churches for observation
- ✓ Develop observation guide and conduct visits
- ✓ Develop hypotheses based on findings
- ✓ Review hypotheses with steering team

March - May

Gather Data and Test Hypotheses

- ✓ Evaluate quality and availability of data
- ✓ Gather existing data
- ✓ Collect additional data
- ✓ Analyze data
- ✓ Develop model to predict church performance outcomes

May - June

Finalize Findings

- ✓ Draft research findings based on model
- ✓ Meet with project team to refine research findings
- Test research findings with steering team
- Deliver final research report

Guiding Principles: Inclusive, Practical, Fact-based Insight and Decisions

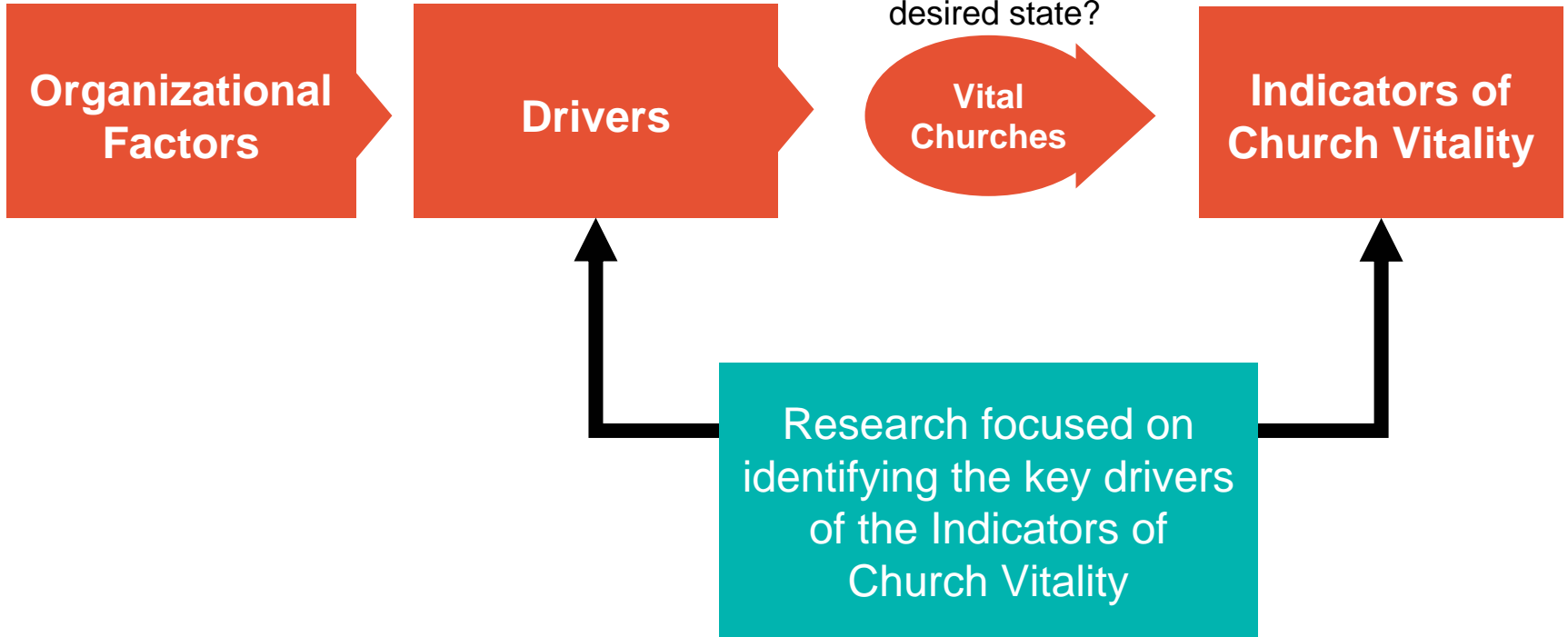
Research model

What are the factors that **indirectly** influence the desired state?

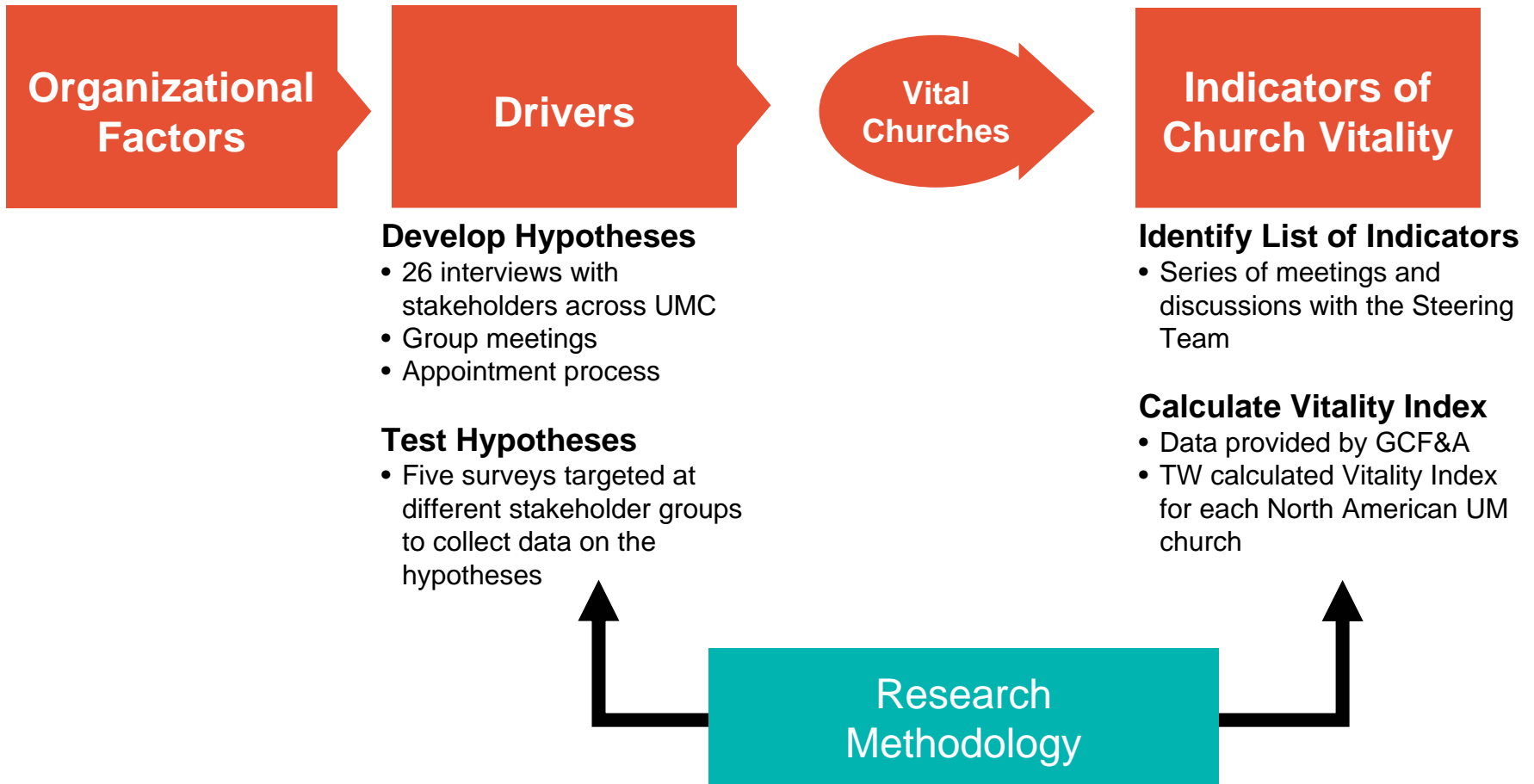
What are the factors that **directly** impact the desired state?

What is the desired state?

What indicates that the desired state has been **achieved**?



Research model (continued)



Testing hypotheses

Survey	Type and Number of Questions
Bishop Survey	<ul style="list-style-type: none"> ● 9 questions measuring potential drivers such as: <ul style="list-style-type: none"> ● Appointment process ● Conference programs focused on vitality
District Superintendent Survey	<ul style="list-style-type: none"> ● 5 questions measuring potential drivers such as: <ul style="list-style-type: none"> ● Time allocation ● Managing performance of Pastors ● 14 questions measuring a sample of their Pastors on aspects of leadership
Pastor Survey	<ul style="list-style-type: none"> ● 22 questions measuring potential drivers such as: <ul style="list-style-type: none"> ● Personal demographics (age, length in current appointment, etc.) ● Laity leadership ● 9 questions measuring aspects of different types of worship services
Church Survey	<ul style="list-style-type: none"> ● 54 questions measuring potential drivers such as: <ul style="list-style-type: none"> ● Church programs offered and attendance in those programs ● Laity leadership ● Congregation ● Worship
SPRC Survey	<ul style="list-style-type: none"> ● 15 questions measuring their Pastor on aspects of leadership

Testing hypotheses (continued)

Survey	Who Was Asked to Take the Survey?
Bishop Survey	All Bishops – North America
District Superintendent Survey	All District Superintendents – North America
Pastor Survey	Sample of Pastors/Churches – North America
Church Survey	
SPRC Survey	

Survey administration

- Email invitations were sent on May 11, 2010
 - Bishop invitation came from the Council of Bishops office
 - District Superintendent, Pastor, Church, SPRC invitations came directly from Towers Watson
- Reminder emails were sent to boost participation
- Survey was open for two and a half weeks to ensure that everyone had the opportunity to participate
- Good response rate across four of the five surveys

Survey response rates

Survey (All North America)	# Invited	# Responding	Response Rate
Bishop Survey	62	33	53%
District Superintendent Survey	458	164	36%
Pastor Survey	17,943	3,392	19%
Church Survey	17,943	2,208	12%
SPRC Survey	3,506	54	2%



Survey Representativeness

Testing for representativeness

Survey (All North America)	Response Rate	Comment
Bishop Survey	53%	TW tied Pastor and Church data to conferences where the Bishop responded
District Superintendent Survey	36%	Based on TW analyses, the respondents to this survey are representative of the population
Pastor Survey	19%	Based on TW analyses, the respondents to this survey are representative of the population
Church Survey	12%	Based on TW analyses, the respondents to this survey are representative of the population
SPRC Survey	2%	Response rate was too low to use these survey responses in our analyses

Why these findings can be trusted

- In a research study like this, we look at two factors
 - Representative – do the findings apply across all of the population? **YES**
 - Reliability – would the findings be replicated if we did the study again? **YES**

The findings apply across the whole North American UMC population and would be replicated if the study were done again.

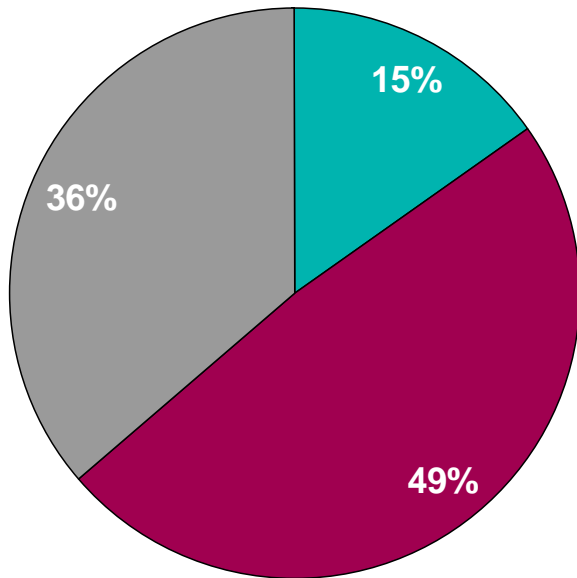
Representative (North America)	<ul style="list-style-type: none">• Each of the conferences are represented• Churches of all sizes are represented• Churches of all levels of vitality are represented• Churches from ethnic minorities (Asian, Black, Hispanic) are represented
Reliability	<ul style="list-style-type: none">• Based on the number of responses, we can be 95% confidence in the results with a margin of error of +/- 2 percentage points

Analysis: Vitality index

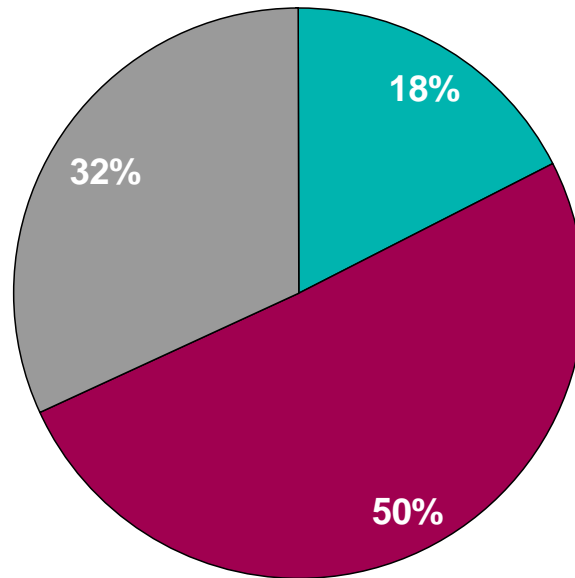
Total church population vs. sample vs. respondents

Conclusion: Respondent population is representative of both Sample and Total Population for North America

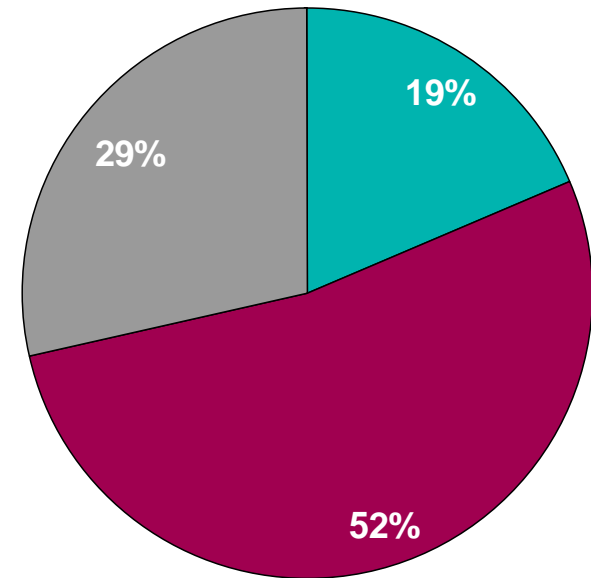
Total Church Population



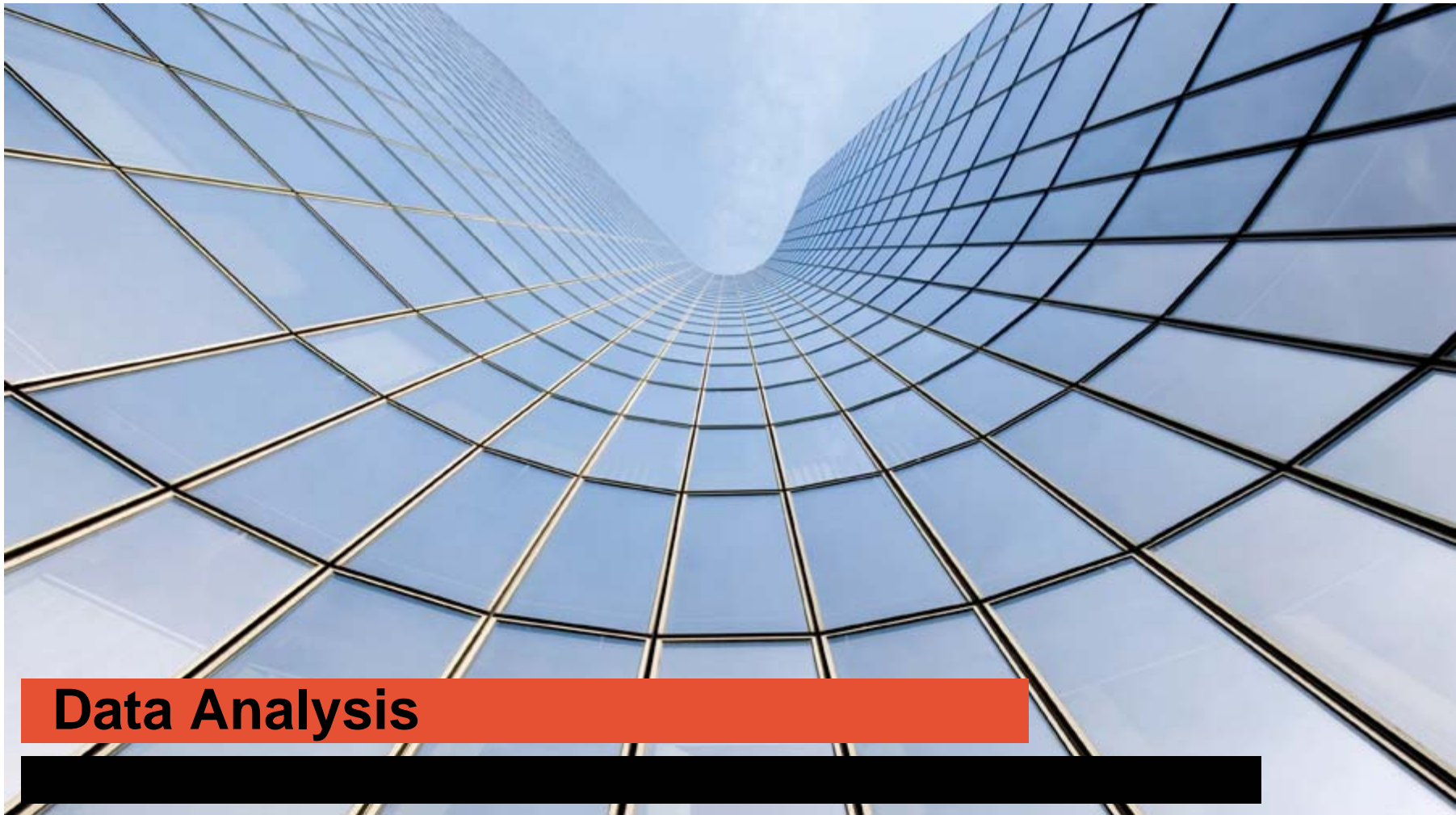
Sample Church Population



Respondent Population



■ High Vitality ■ Medium Vitality ■ Low Vitality



Data Analysis

Indicators of vitality based on Steering Team input

1. Average worship attendance as percentage of membership

- 1.a. Single point and over five years
- 1.b. Increase or decrease over five years

2. Total membership

- 2.a. Single point and over five years
- 2.b. Increase or decrease over five years

3. Number of children, youth, and young adults attending as a percentage of membership

- 3.a. Single point and over five years
- 3.b. Increase or decrease over five years

4. Number of professions of faith as percentage of (a) attendance and (b) membership

- 4.a. Single point and over five years
- 4.b. Increase or decrease over five years

5. Annual giving per attendee

- 5.a. Single point and over three years
- 5.b. Increase or decrease over three years

6. Financial benevolence beyond the local church as a percentage of church budget

- 6.a. Single point and over five years
- 6.b. Increase or decrease over five years

NOTE: The indicators of vitality were chosen as proxies for vitality by the steering team as the indicators needed to be measurable and have available data

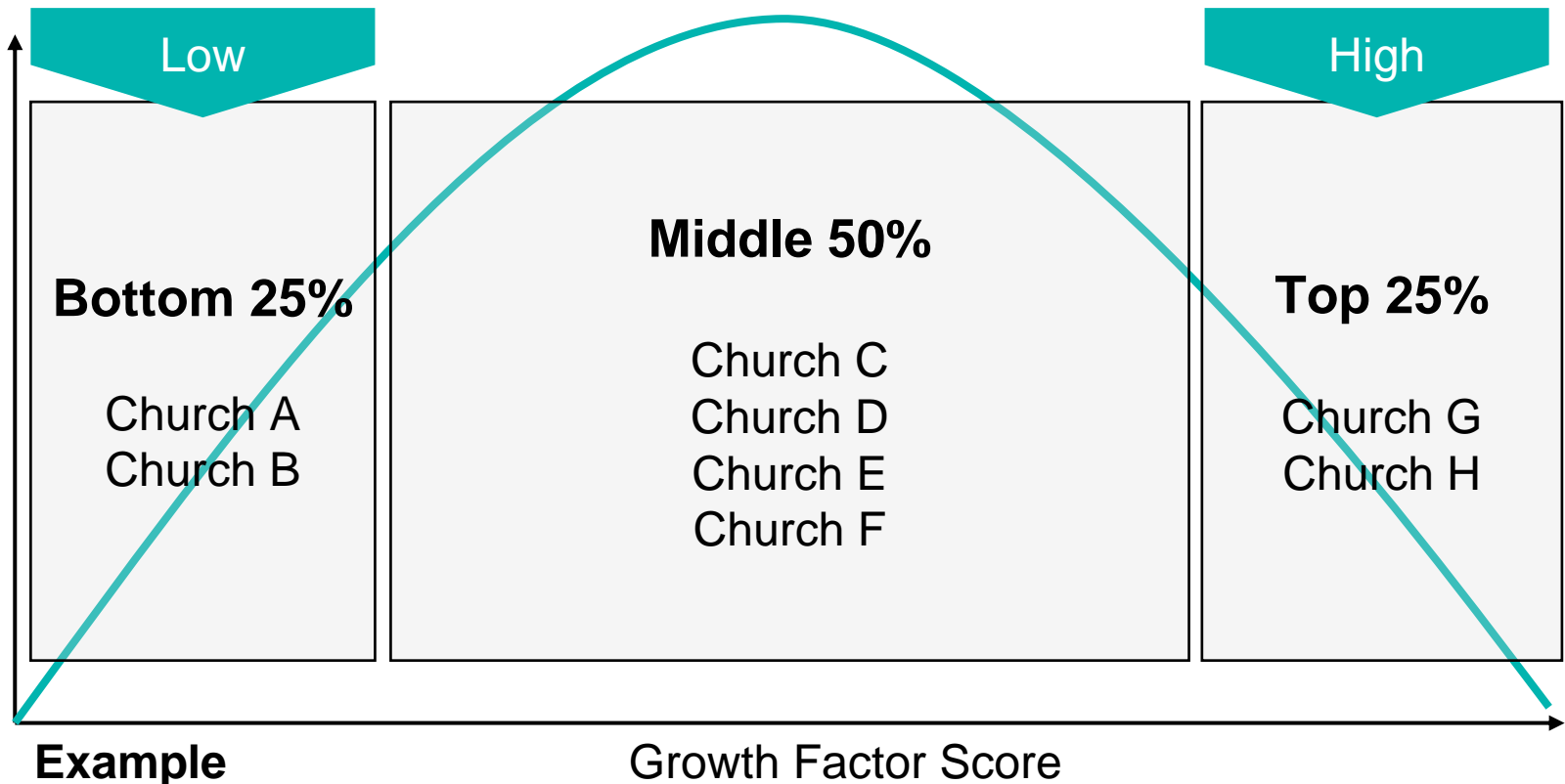
Vitality index

- Towers Watson used a statistical technique called factor analysis to group the Indicators of Vitality into three factors as shown below

Factor	Indicators of Vitality
Attendance	<ul style="list-style-type: none">• Average worship attendance as percentage of membership• Number of children, youth, and young adults attending as a percentage of membership
Growth	<ul style="list-style-type: none">• Change in average worship attendance as percentage of membership over five years• Change in membership over five years• Change in annual giving per attendee over three years• Change in financial benevolence beyond the local church as a percentage of church budget over five years
Engagement	<ul style="list-style-type: none">• Professions of faith per member• Annual giving per attendee

Vitality index (continued)

- A score was calculated for each church in North America where data were available (n= 32,228) for each of the three factors
- Churches were segmented into three groups based on the distribution of their scores



Vitality Index (continued)

- A numeric score (either 1, 2, or 3) was assigned to each of the factors for each church depending on whether they were in the Top, Middle, or Bottom segment of the distribution

Factor	Indicators of Vitality	Top 25%	Middle 50%	Bottom 25%
Attendance	<ul style="list-style-type: none"> • Average worship attendance as percentage of membership • Number of children, youth, and young adults attending as a percentage of membership 	3	2	1
Growth	<ul style="list-style-type: none"> • Change in average worship attendance as percentage of membership over five years • Change in membership over five years • Change in annual giving per attendee over three years • Change in financial benevolence beyond the local church as a percentage of church budget over five years 	3	2	1
Engagement	<ul style="list-style-type: none"> • Professions of faith per member • Annual giving per attendee 	3	2	1

Vitality Index (continued)

- A single index was calculated for each church by adding up the numeric scores on each of the three factors

Church	Attendance	Growth	Engagement	Vitality Index
A	3	3	3	9
B	3	2	1	6
C	2	2	2	6
D	1	1	1	3

Example

Vitality Index (continued)

- To facilitate the analysis, the vitality index was collapsed into three categories: High Vitality, Medium Vitality, and Low Vitality

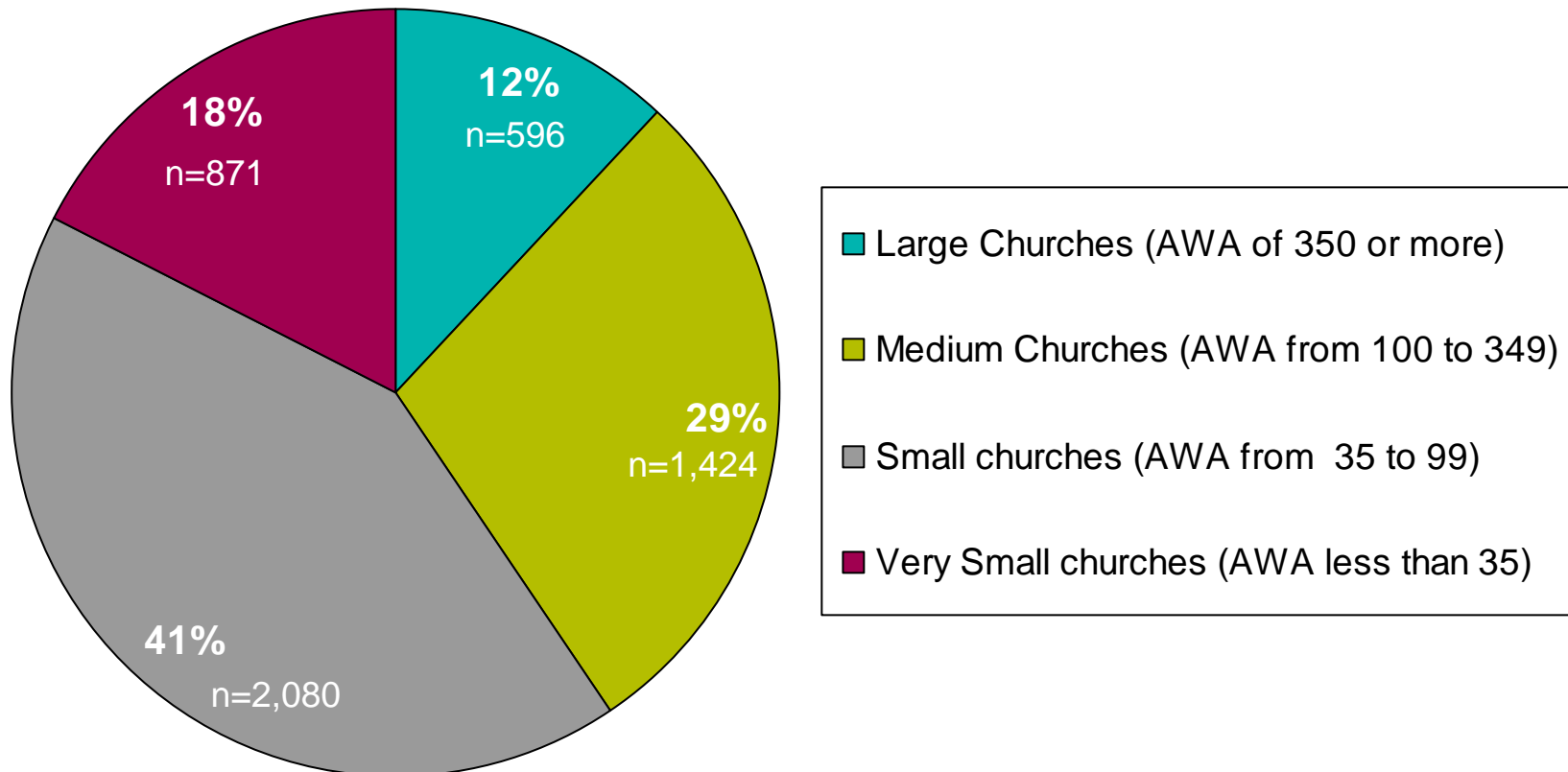
Vitality Index	Category	% of Total* UMC NA Churches	# of UMC NA Churches
9	High Vital	15%	4,961
8			
7	Medium Vital	49%	15,546
6			
5	Low Vital	36%	11,721
4			
3			

*Based on the 32,228 churches with available data on the Indicators of Vitality

Vitality index by church size

- While larger churches are more likely to be vital than smaller churches there are many high vital churches across all church sizes

Percent of Total Vital Churches by Church Size



Calculating the key drivers of vitality

- Statistical technique used to identify the impact of variables on a desired outcome
 - **Direction** - Does this variable have a positive or negative impact on the desired outcome?
 - **Magnitude** – How much impact does this variable have on the desired outcome?
- Commonly used statistical technique in consumer, employee and political research to help identify and prioritize actions that will have the greatest impact on a desired outcome

Calculating the key drivers of vitality (continued)

- Regression analysis quantified the relationship between the variables in each hypotheses and the Indicators of Vitality
 - Some factors had a positive impact
 - Some factors had a negative impact
 - Some factors had no significant impact
- Regressions showed also that the variables in each hypothesis impacted the factors of vitality (Attendance, Growth, Engagement) in different ways
 - Throughout the findings, we will highlight when the hypotheses had an impact on the Vitality Index and when the hypotheses had an impact on specific factors of vitality



Findings

Four key areas are the drivers of vitality



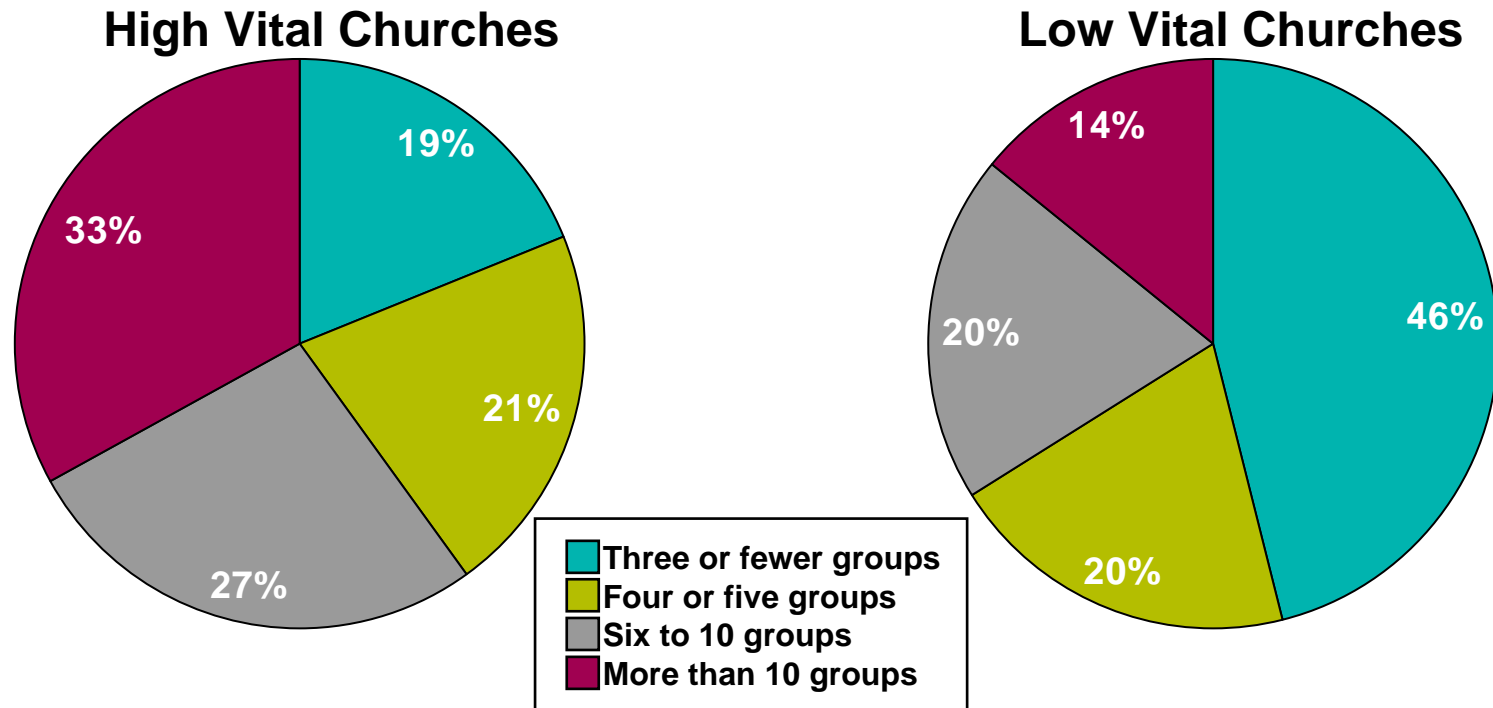
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- Based on vitality index, Towers Watson found that all kinds of UMC churches are vital – small, large, across different geographies, and church setting (e.g., urban, rural)
- Towers Watson conducted regression analyses to identify drivers of the vitality index and four key drivers of vitality stand out – crystal clear findings that are actionable
- The four key drivers of vitality are fairly consistent across different types of churches

Note: Small groups include study, fellowship, and service.
Programs include classes and other activities

Small groups & programs

Number of small groups – all churches

- Regressions identified that the number of small groups (study, fellowship, service) impacts vitality



- 60% of churches with high vitality have over 5 small groups
- Only 1/3 of churches with low vitality have over 5 small groups

Note: Small groups include study, fellowship, and service

Small groups & programs

Number of small groups – by church size

- Regardless of size, more vital churches have more small groups

	# of Groups in a High Vital Church	# of Groups in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	37.5	22.5	66%
Medium Size Churches (AWA between 100 and 349)	12.1	9.8	23%
Small churches (AWA between 35 and 99)	5.1	4.5	12%
Very Small churches (AWA less than 35)	2.9	2.5	16%

Note: Small groups include study, fellowship, and service

Small groups & programs

Number of programs for children

- Regardless of size, more vital churches have more programs for children (under 12 years old)

	# of Programs in a High Vital Church	# of Programs in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	16.9	6.8	149%
Medium Size Churches (AWA between 100 and 349)	6.7	4.7	42%
Small churches (AWA between 35 and 99)	3.4	2.5	34%
Very Small churches (AWA less than 35)	2.2	1.4	59%

Note: Programs include classes and other activities

Small groups & programs

Number of programs for youth

- Regardless of size, more vital churches have more programs for youth (age 12 -18)

	# of Programs in a High Vital Church	# of Programs in a Low Vital Church	% Difference
Larger Churches (AWA of 350 or more)	8.7	4.7	83%
Medium Size Churches (AWA between 100 and 349)	3.5	2.4	45%
Small churches (AWA between 35 and 99)	1.8	1.2	43%
Very Small churches (AWA less than 35)	1.3	0.7	75%

Note: Programs include classes and other activities

Small groups

- Several factors around programs (classes and groups) did NOT have a significant impact on vitality
 - Percent of eligible attendees who participate
 - Who has primary responsibility for leading programs
 - Mix of local vs. global mission outreach programs
 - Number of programs for young adults and adults

Note: Programs include classes and other activities

Lay leadership

Effectiveness of lay leadership

- Effectiveness of lay leadership has a strong impact on vitality

Churches with effective lay leadership are:

- 84% more likely to be a high vital church
- 48% more likely to be high attendance church
- 54% more likely to be a high growth church
- 30% more likely to be a high engagement church

What drives laity Effectiveness?

- Demonstrate vital personal faith
- Rotate
- More attendees serving as lay leaders

Lay leadership

Building effective lay leadership

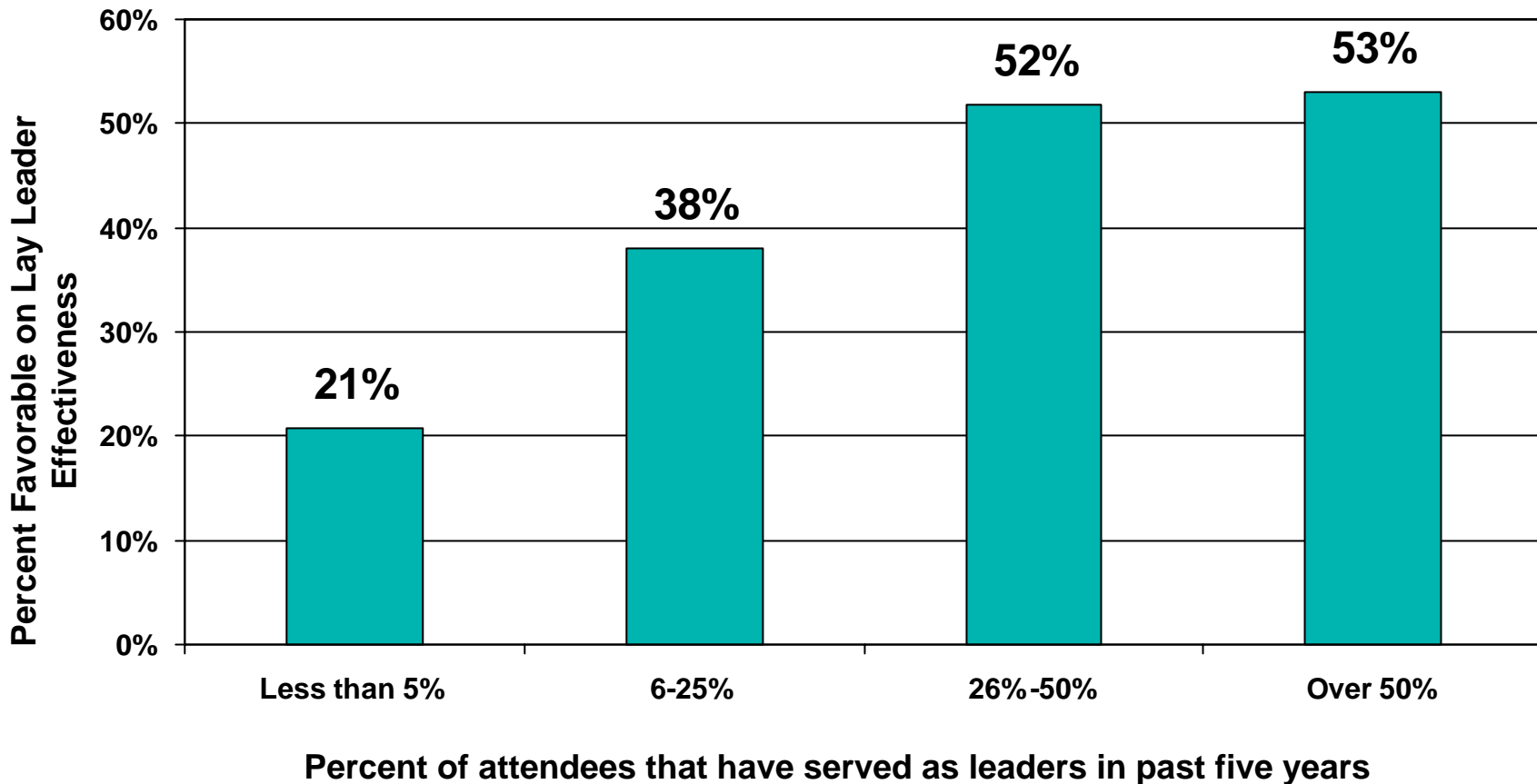
- Highly effective lay leadership is strongly associated with those who demonstrate vital personal faith

	Highly Effective Lay Leadership	Ineffective Lay Leadership
Lay leadership team demonstrate vital personal faith (e.g., regular disciplines of prayer and Bible Study, regular attendance at weekly worship, proportional giving, participation in mission opportunities, personal faith-sharing)	61%	12%
Rotate lay leadership	77%	66%

Lay leadership

Building effective lay leadership

- Need to reach critical mass equal to 25 – 50% of attendees who have served as leaders to create effective lay leaders and drive vitality



Lay leadership

Building effective lay leadership

- Pastors who were rated as effective at developing, coaching and mentoring lay leaders are more likely to have high vital churches

Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance	70%	47%

Note: Numbers shown represent the % of churches that are high vital when the pastor was rated effective

Worship service

Mix of contemporary and traditional

- High vital churches tend to provide a mix of both traditional and contemporary services

	% of Churches that are High Vitality	% of Churches that are Low Vitality
Traditional Service ONLY	31%	55%
Contemporary Service ONLY	21%	15%
Traditional AND Contemporary Services	43%	24%
Neither Contemporary NOR Traditional Services	6%	6%

Worship service

Mix of contemporary and traditional by church size

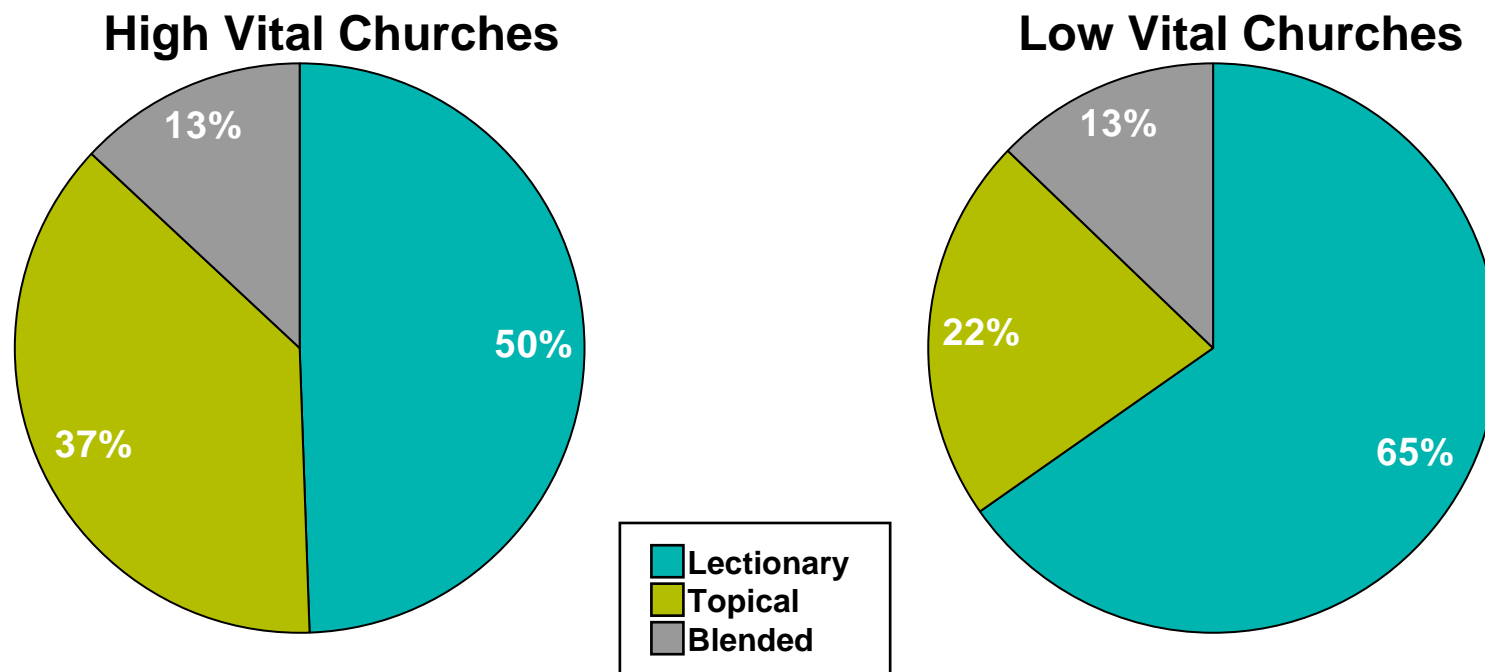
	% of Churches that are High Vitality	% of Churches that are Low Vitality
Larger Churches with Traditional AND Contemporary Services (AWA of 350 or more)	42% (n=86)	4% (n=8)
Medium Size Churches with Traditional AND Contemporary Services (AWA between 100 and 349)	22% (n=125)	21% (n=121)
Small churches with Traditional AND Contemporary Services (AWA between 35 and 99)	19% (n=45)	29% (n=70)
Very Small churches with Traditional AND Contemporary Services (AWA less than 35)	16% (n=8)	53% (n=27)

Traditional worship service

Basis for preaching

- Preaching in **traditional** worship services at high vital churches tends to be more topical and less based on the lectionary than in churches with relatively low vitality

What is the make-up of preaching in your **Traditional** service?



Worship service

Inspirational Preaching

- Pastors who were rated as effective at inspiring the congregation are more likely to have high vital churches

Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Inspiring the congregation through preaching	81%	65%

Note: Numbers shown represent the % of churches that are high vital when the pastor was rated effective

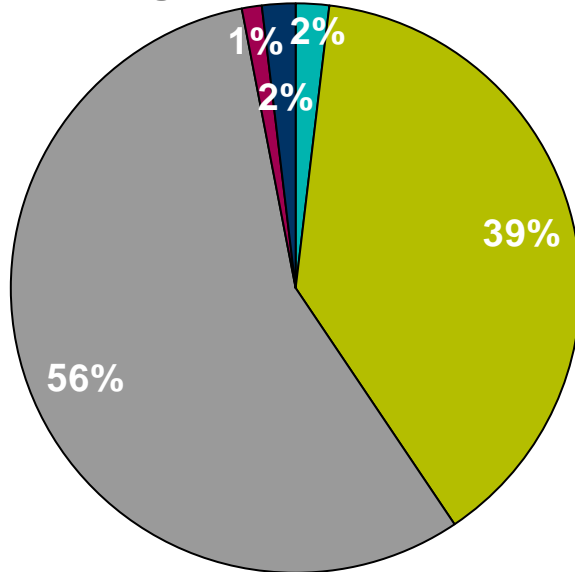
Contemporary worship service

Type of worship music

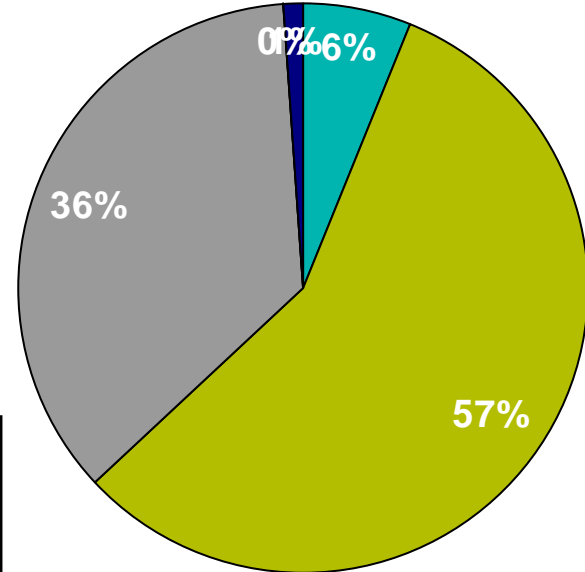
- High vital churches are more likely to use contemporary music in their contemporary services

What type of music do you use in your **Contemporary** service?

High Vital Churches



Low Vital Churches



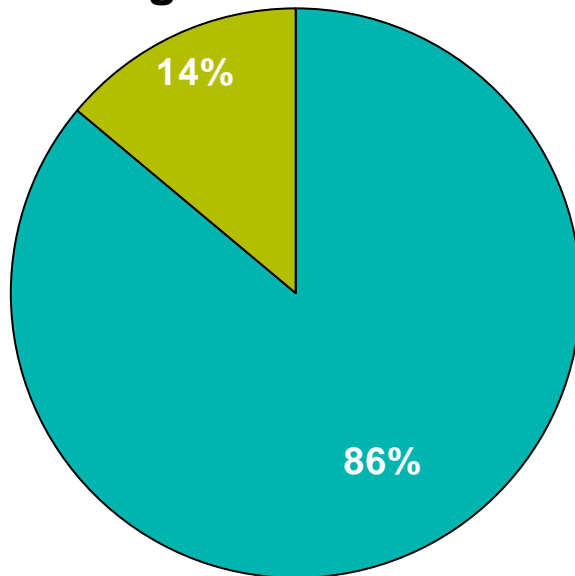
Contemporary worship service

Use of multi-media

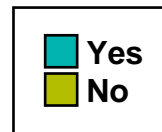
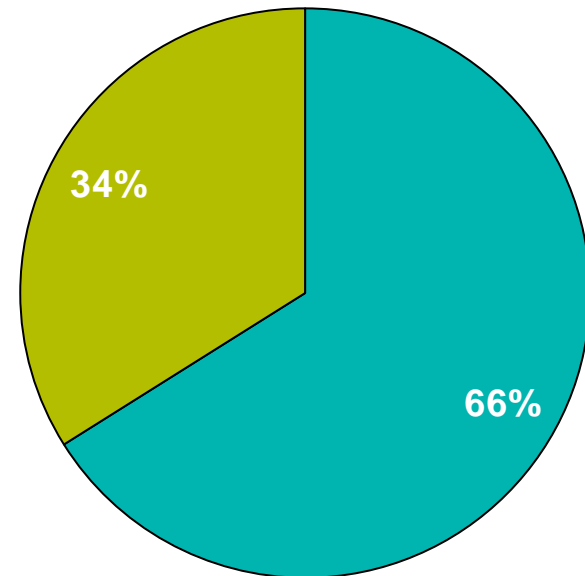
- High vital churches are more likely to use multi-media in their contemporary services

Do you use multi-media in your **Contemporary** services?

High Vital Churches



Low Vital Churches



Worship service

- Several factors around the worship service did NOT have a significant impact on vitality
 - Use of experiential activities (e.g., prayer station, art, straw polls) during the service
 - Length of sermon
 - Make-up of preaching in Contemporary worship services
 - Type of music and use of multimedia in Traditional worship services

Pastor

Leadership effectiveness

- Over 1,200 Pastors, from all church sizes across North America, were assessed on 14 leadership attributes
 - Working in partnership with others (e.g., lay leaders, congregation) to accomplish goals
 - Recognizing, addressing, and managing discord in a fair and positive manner
 - Encouraging and empowering others to take ownership
 - Focusing on developing, coaching and mentoring to enable Laity leadership to improve performance
 - Inspiring passion and enthusiasm in others for spiritual development, discipleship, and outreach
 - Developing personal knowledge, skills, and abilities to continuously improve and grow oneself
 - Defining and articulates a future vision for the local church
 - Inspiring confidence and trust through words and deeds
 - Demonstrating effective management of the local church (e.g., financial, operational, staff)
 - Influencing the actions and behaviors of others to accomplish changes in the local church
 - Recognizing, understanding, and empathizing with the feelings and needs of others and responds accordingly
 - Propelling the local church to set and achieve significant goals through effective leadership
 - Understanding and leading in the context in which they serve
 - Inspiring the congregation through preaching

Pastor

Leadership effectiveness (continued)

- Four of the leadership attributes have a stronger impact on vitality than the others

Leadership Attribute	Churches with High Vitality	Churches with Low Vitality
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance	70%	47%
Influencing the actions and behaviors of others to accomplish changes in the local church	79%	53%
Propelling the local church to set and achieve significant goals through effective leadership	76%	51%
Inspiring the congregation through preaching	81%	65%

Note: Numbers shown represent the % of churches that are high vital when the pastor was rated effective

Pastor

Leadership effectiveness (continued)

- The four key leadership attributes have stronger impact on some of the factors of vitality than others

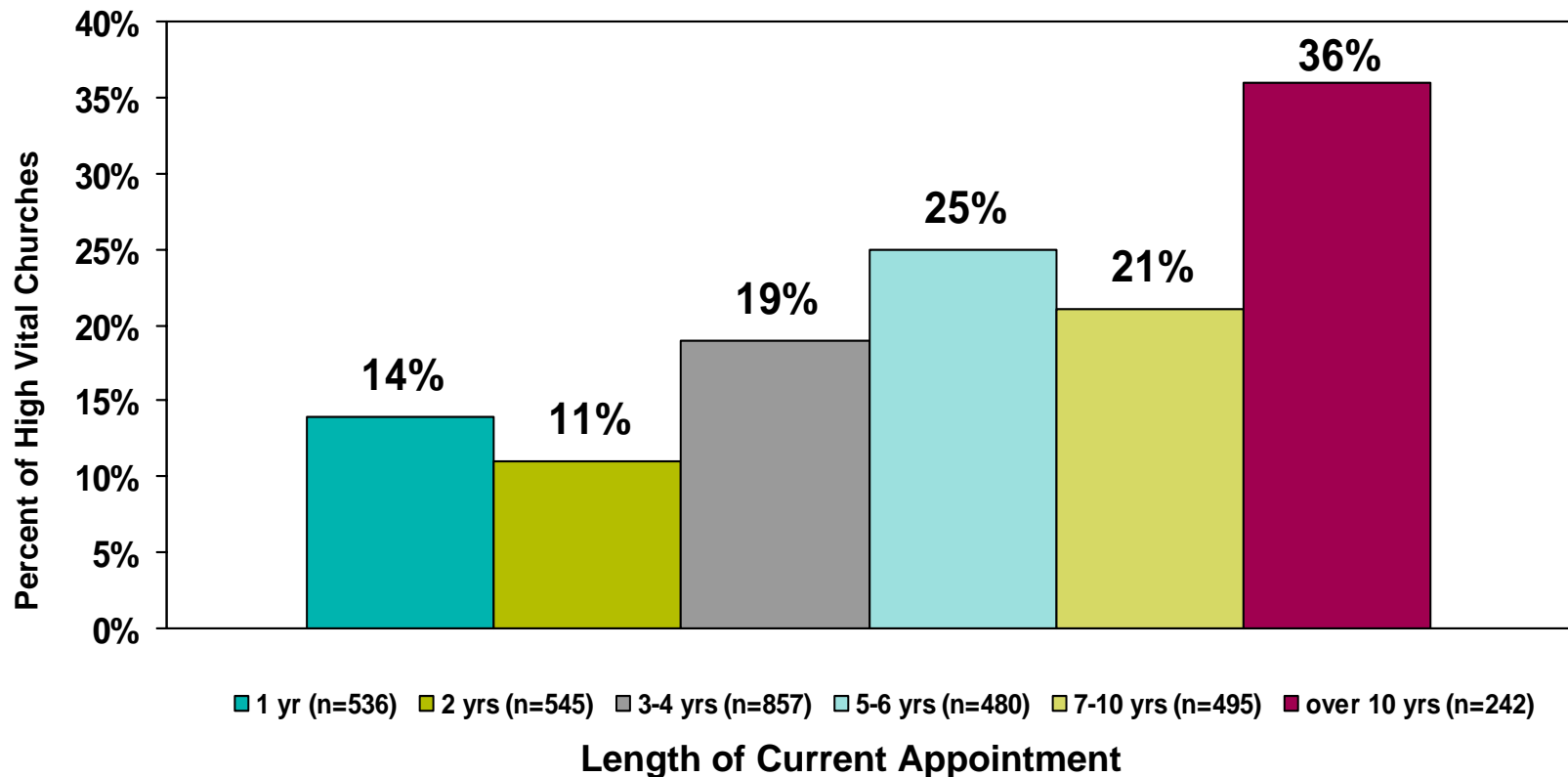
Leadership Attribute	Attendance Factor	Growth Factor	Engagement Factor
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance	■		■
Influencing the actions and behaviors of others to accomplish changes in the local church		■	
Propelling the local church to set and achieve significant goals through effective leadership	■		
Inspiring the congregation through preaching	■	■	

■ Denotes the variable has a positive impact on the factor of vitality

Pastor

Length of appointment

- Contribution of the Pastor to vitality is evident after three years

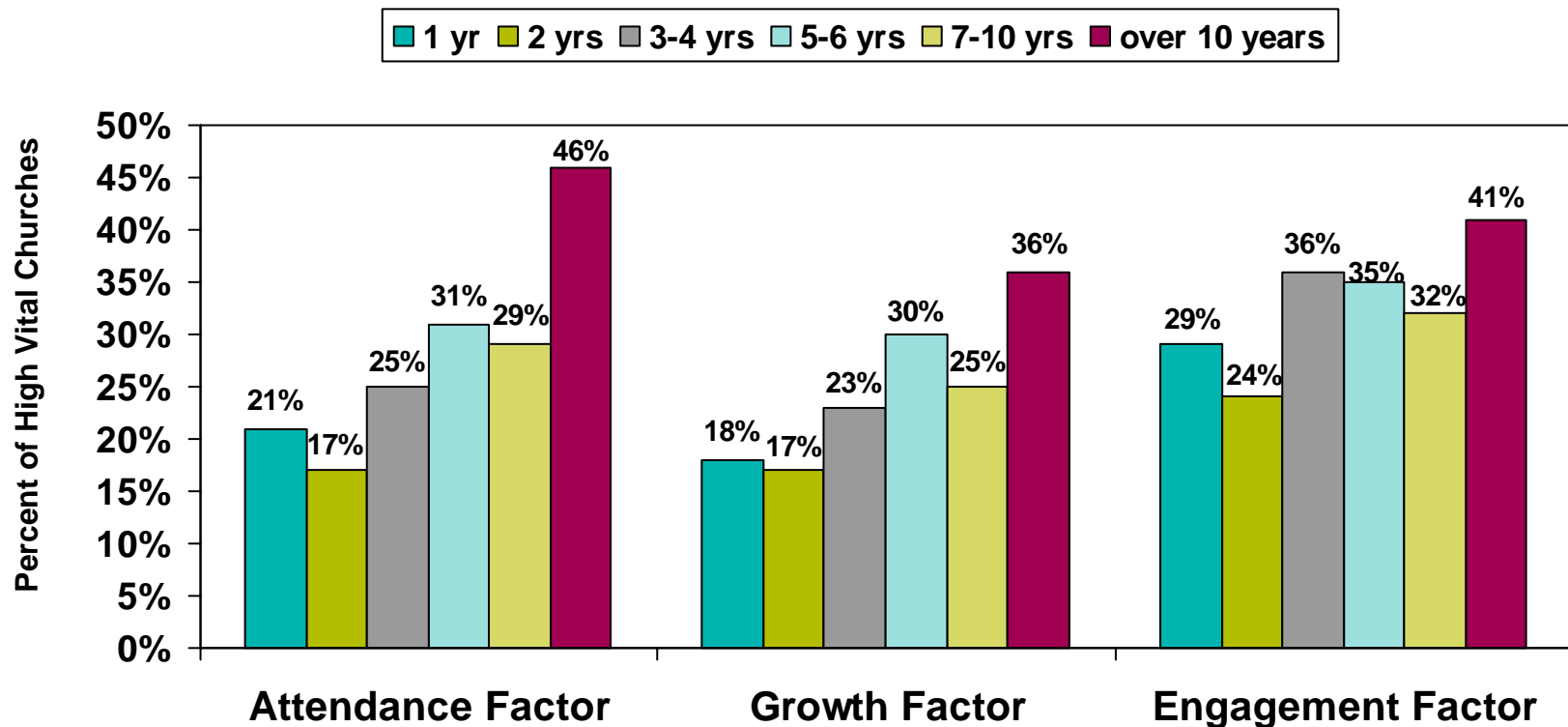


NOTE: Patterns and findings are consistent when Pastors who had several short-term appointments are included or removed from analysis

Pastor

Length of appointment (continued)

- Pastor contribution to vitality builds quickly for the engagement part of vitality compared to the other two sub-factors.



Pastor

- Several factors around the Pastor did NOT have a significant impact on vitality
 - Graduating from seminary or not
 - Years engaged in pastoral ministry
 - Whether pastoral ministry is first or second career

Four key areas are the drivers of vitality



Note: Small groups = study, group and fellowship

Driving different factors of vitality

Driver	Overall Vitality	Attendance Factor	Growth Factor	Engagement Factor
Small Groups				
Number of small groups				
Number of programs for children				
Number of programs for youth				
Lay Leadership				
Effectiveness of lay leadership				
Lay leadership demonstrating vital personal faith				
Rotating lay leadership				
% of attendees serving as leaders in past 5 years				
Worship Service				
Mix of Traditional and Contemporary service				
Using more topical preaching in Traditional service				
Using more contemporary music in Contemporary service				
Using more multi-media in Contemporary service				
Pastor				
Focusing on developing, coaching and mentoring to enable laity leadership to improve performance				
Influencing the actions and behaviors of others to accomplish changes in the local church				
Propelling the local church to set and achieve significant goals through effective leadership				
Inspiring the congregation through preaching				
Length of appointment				

 Denotes the driver has a positive impact on the factor of vitality

Note: Small groups include study, fellowship, and service

Driving vitality in different types of churches

The four key drivers of the indicators of vitality (small groups, lay leadership, worship service, and the pastor) are **consistent regardless church size, predominant ethnicity, and jurisdiction**

In addition to the four key drivers of the indicators of vitality, some nuances by church size and jurisdiction include

- Nuances by size of church include:
 - For large churches (AWA of 350 or more), being representative of the community around them and having pastors who spend more time on preaching, planning and leading worship has a strong relationship with vitality
- Nuances by jurisdiction include:
 - In the South Central and South Eastern jurisdictions, the length of tenure of the clergy as pastors has a strong relationship with vitality
 - In the North Eastern jurisdiction, pastors spending more time on personal devotion and worship has a strong relationship with vitality
 - In the Western jurisdiction, churches that are representative of the community around them and have a pastor that leads in the context of the community have a higher association with vitality
- No variations by predominant ethnicity

Four key areas are the drivers of vitality



Note: Small groups include study, fellowship, and service



Q&A



UMC Call to Action: Vital Congregations Research Project

Steering Team Meeting

June 28, 2010

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